

The Federal Department of Education policy for verifying Student and/or Parent Income requires the student and/or parent to obtain the **2023 IRS Tax Return Transcript**. The various IRS 1040 tax forms are NOT acceptable. Please do not send us a copy of those unless we specifically request it. *Our office cannot use it for the verification process.*

### **Requesting the 2023 IRS Tax Return Transcript**

The IRS provides two methods to request the Tax Return Transcript. You can choose to order by Online, which if successful, will provide a download of the document within minutes, or order by postal mail, which may take up to two weeks to get.

For Online, follow steps in section A below, otherwise to order by mail, follow steps in section B below.

#### **Section A – Online**

Step 1: Go to <https://www.irs.gov/Individuals/Get-Transcript>

Step 2: Click on the blue “Get Transcript ONLINE” button. If you do not have an IRS account (most people don’t), you will need to create one and then follow the instructions and meet the criteria. If successful, you will be presented with the ability to download the **2023** Return Transcript, and you can attach and email it to me.

#### **Section B – By Mail**

It takes up to two weeks for the IRS income information to be available for electronic tax filers and eight weeks for paper tax filers. If you and/or your parents are married and filed separately on a **2023** Tax Return, you must submit each person’s transcripts.

You will need to know your **Social Security Number, date of birth, and the address on file with the IRS**.

Step 1: Go to <https://www.irs.gov/Individuals/Get-Transcript>

Step 2: Click on the blue “Get Transcript by MAIL” button.

Step 3: Enter your SSN (xxx-xx-xxxx format), your date of birth, street address only as shown your tax form (no city or state), and your zip code.

Step 4: Click the Continue button.

Step 5: Under “Type of Transcript” select “**Return Transcript**” from the dropdown.

Step 6: Under “Tax Year” select “2023”

Step 7: Click Continue. The screen should provide you status and delivery information.

**OR** if you encounter difficulties, call: **1-800-908-9946**

\*Make sure to request the “**IRS tax return transcript**” NOT the “IRS tax account transcript”